



**Indiana Supreme Court  
Division of State Court Administration  
Adult Guardianship Office**

30 South Meridian Street; Suite 500    Phone: 800.542.0813  
Indianapolis, IN 46204-3417        Fax: 317.233.6586

**INSTRUCTIONS FOR COMPLETING THE  
2015 SENIORS OR INCAPACITATED ADULTS SERVED CHART**

PLEASE READ! There are often questions regarding the categories on the Annual Seniors or Incapacitated Adults Served Chart. We have labeled each of the columns A-G, and offer an explanation of each column below. We want to gather information about the number of seniors or incapacitated adults served by your program in 2015 (not the number of cases.) Please note that “served” means that you have had regular contact with the seniors or incapacitated adults sufficient to have in-depth knowledge of their cases and make fact-based recommendations to the court on their behalf. “Un-served” seniors or incapacitated adults means that they were NOT assigned a volunteer advocate at all (staff or volunteer) who had regular contact with them and made fact-based recommendations to the court on their behalf. Seniors or incapacitated adults whose cases are “monitored” (meaning a paper review of the case and the seniors or incapacitated adults are not contacted by a volunteer advocate) should be included as being un-served. Seniors or incapacitated adults who are assigned an attorney or private guardian should not be included as being un-served. If you do not assign volunteers to seniors or incapacitated adults in some of the case types below, please indicate with a “0” (“zero”). **Please complete the entire chart, and be sure to include the name of each county you serve at the top of the page. Please complete one sheet for each county your program serves.**

It is helpful to think of the chart in this way: once a senior or incapacitated adult is assigned to the program, he or she will remain somewhere in columns A-F until his or her case is finally closed (for whatever reason), and then he or she will be listed in column G.

- **Column A:** This column represents ALL seniors or incapacitated adults being served by a volunteer or staff member at the end of 2014 and carried over into 2015. In other words, these cases were still open at the end of 2014 (and a volunteer/staff member was assigned to the case) and they were carried over from 2014 into 2015. This is true whether they were newly assigned and received volunteer advocates immediately (in the quarter in which their cases were filed) **OR** were moved off the waitlist and appointed volunteer advocates from a quarter other than the quarter in which their cases were newly filed. For example: A senior or incapacitated adult’s case is filed in Q2 of 2014, but the senior or incapacitated adult is placed on the waitlist until Q4 of 2014 when a volunteer advocate is appointed. This case is still open in 2015. That senior or incapacitated adult’s case is *carried over as being served* (and removed from column F, which is the waitlist column), and would be included in Column A.
- **Column B:** This column represents all seniors or incapacitated adults whose cases were newly filed sometime in 2015 only, and who were served by a **volunteer advocate**.

- **Column C:** This column represents all seniors or incapacitated adults whose cases were newly filed sometime in 2015 only, and who were served by a **staff member from your program**.
- **Column D:** The combined total of Columns B and C.
- **Column E:** The combined total of Columns A and D.
- **Column F:** The total number of seniors or incapacitated adults who were still on a waiting list for a volunteer advocate as of December 31, 2015. This does **not** include seniors or incapacitated adults who were on the waiting list and whose cases were closed before they ever received a volunteer advocate. Please be sure you only include seniors or incapacitated adults whose cases are currently open and those who are waiting for a volunteer advocate. Please be sure your list of open and closed cases is current so that you are not including seniors or incapacitated adults on your waiting list whose cases have actually been closed.
- **Column G:** The total number of seniors or incapacitated adults whose cases were closed **for any reason**. This includes: cases closed with an active volunteer advocate assigned, cases closed when the senior or incapacitated adult was still on the waiting list (and thus was never assigned a volunteer advocate), cases closed when the senior or incapacitated adult died and a final report was made to the court pursuant to IC 29-3-8.5-2(5), cases closed when the senior or incapacitated adult regained legal competence, etc.